

Creating and Viewing Case Notes/Structured Case Notes

Introduction

A case note (aka Narrative) is used to document critical case management contacts made throughout the life of a case.

The guide addresses:

- Creating a Case Note with Case Assignment
- Creating Case Notes from Search
- Creating a Case Note
- Searching Structured Case Notes from a Case or Permanency Plan
- Creating a Structured Case Note
- Viewing Case Notes

While case assignment is not required to create a note, it may limit information presented in the Structured Case Note format.

Related User Guides:

[Creating Correction Notes](#)

[Documenting Monthly Case Worker Contacts](#)

[Recording & Reporting Face-to-Face Contacts](#)


[Initial Face-to-Face Contacts](#)

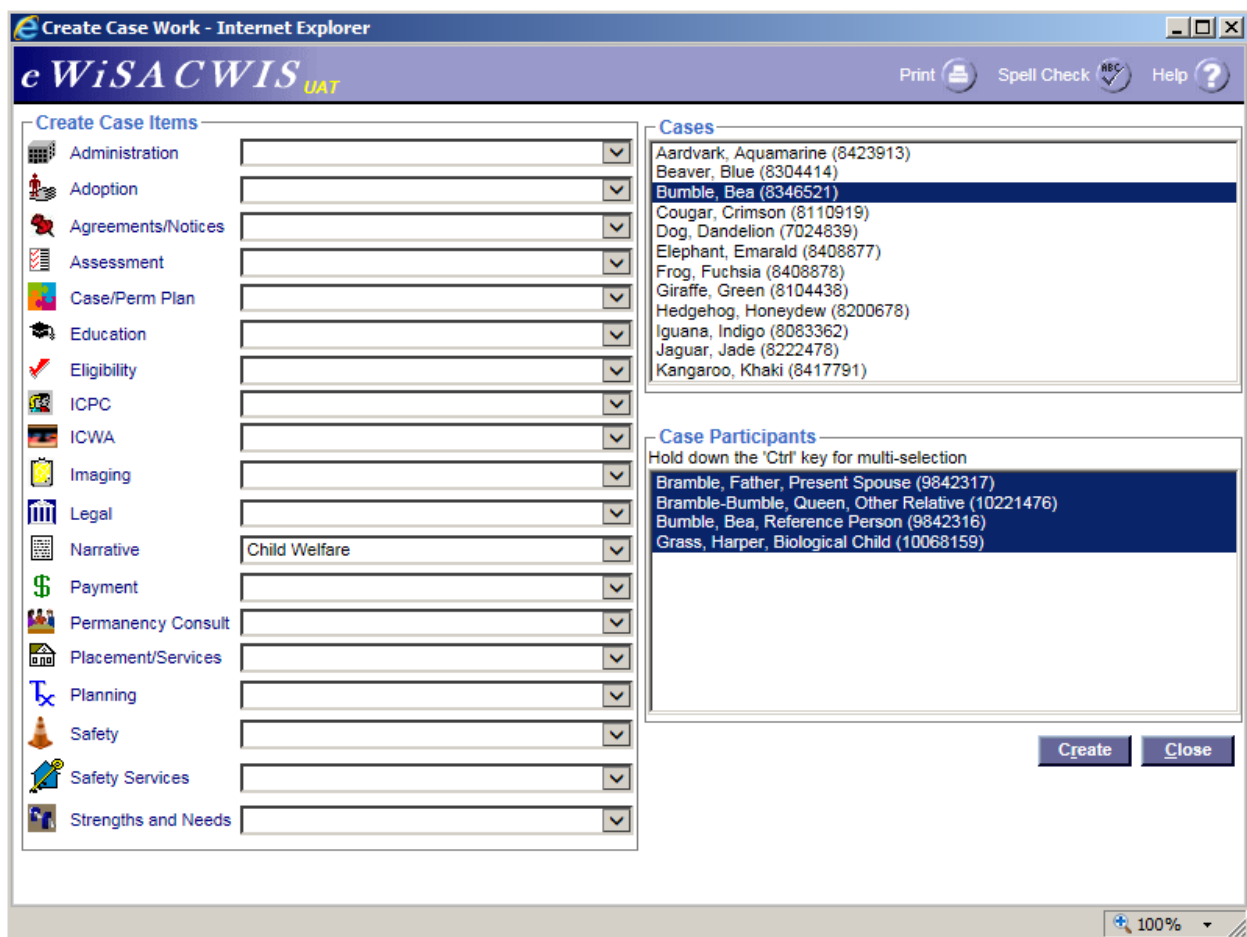
Creating a Case Note with Case Assignment

When assigned to a case, Case Notes can be created 2 ways:

- a. Create Case Work
- b. Case [Actions](#) hyperlink

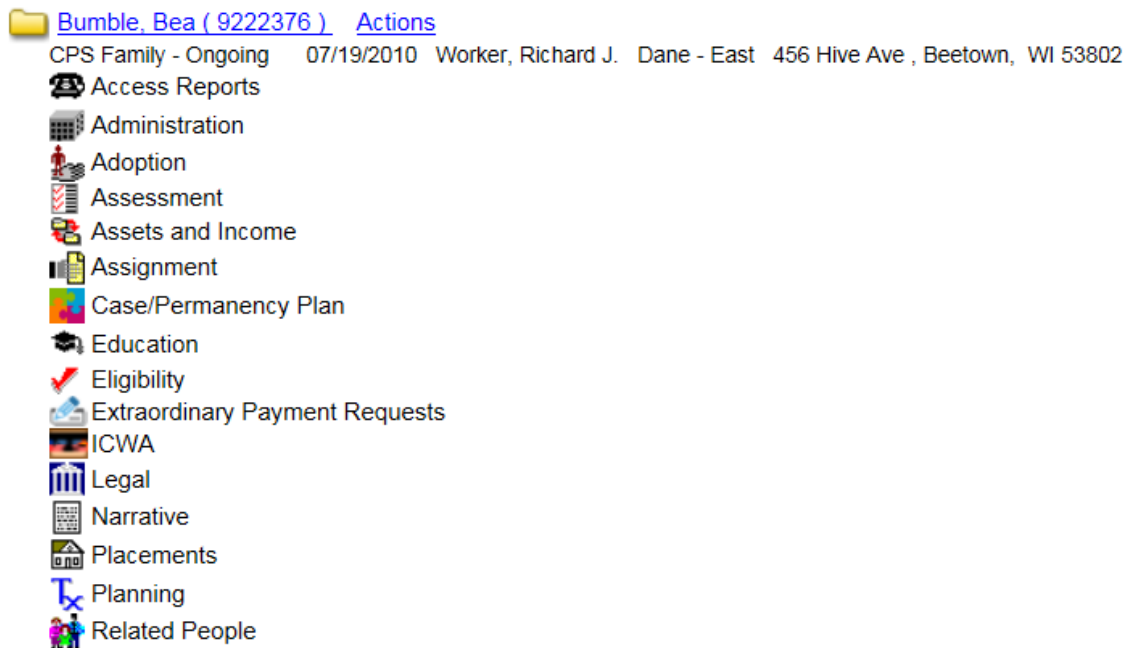
a. From Create Case Work

1. From the desktop, select Create > Case Work or click the Case Work button  to open the Create Case Work page.
2. On the Create Case Work page, select the appropriate note Category from the Narrative drop-down and the Case. Selecting Case Participants is optional; use the 'ctrl' key to select more than one participant. Click Create to open the Case Notes page.

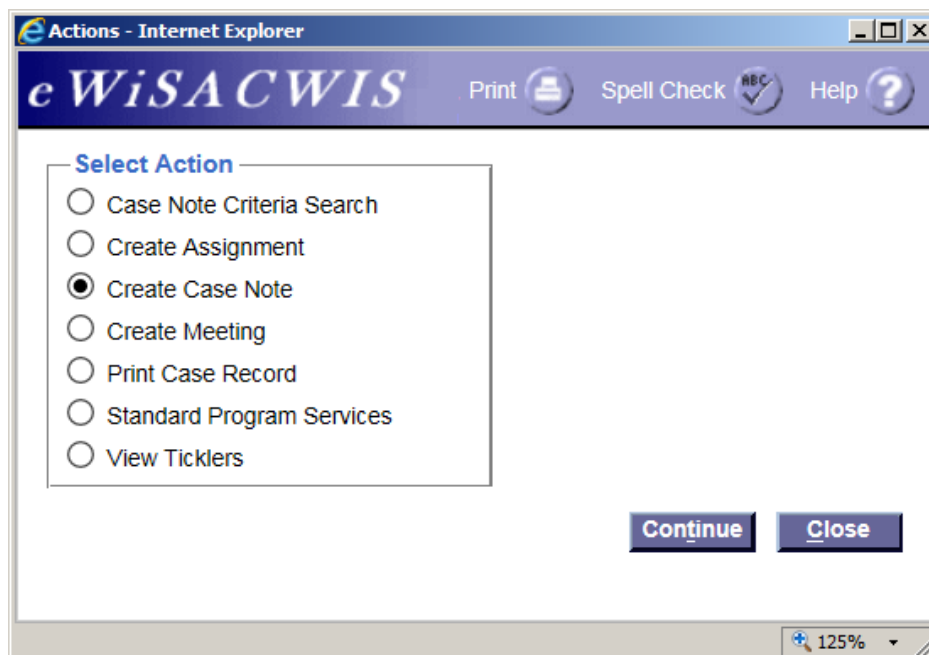


b. From the Case [Actions](#) hyperlink

1. From the desktop, select the [Actions](#) hyperlink to the right of the Case Name to open the Actions pop-up page.




2. On the Actions page, select Create Case Note and click Continue to open the Case Notes page.

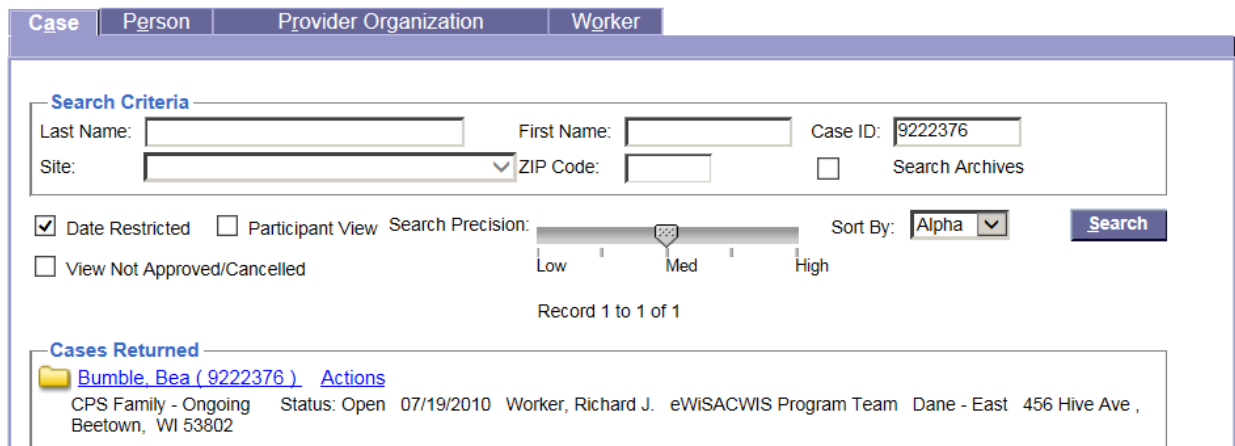


Creating Case Notes from Search

Note: Case Assignment is not required when creating a note via the Search page.

Note: The case can be in Open or Closed Status.

1. From the desktop, select Utilities>Search or Click the Search button  to open the Search page.
2. Search out the case by using the Case Name or Case ID number. Once the desired case is identified in Cases Returned group box, select the [Actions](#) hyperlink to the right of the Case Name to open the Actions pop-up page.




Search Criteria

Last Name: First Name: Case ID:
Site: ZIP Code: ☐ Search Archives

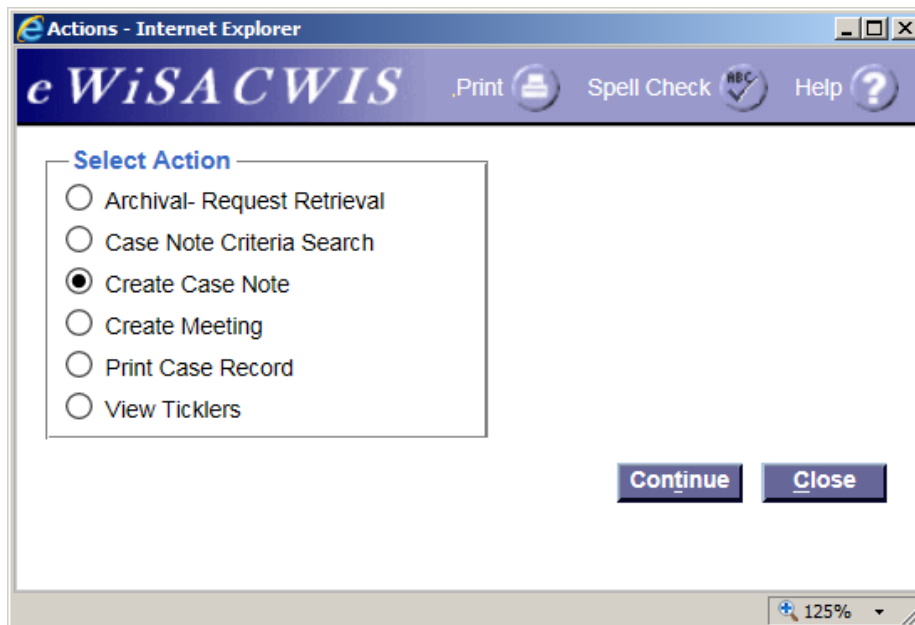
☒ Date Restricted ☐ Participant View Search Precision: Sort By:
☐ View Not Approved/Cancelled

Record 1 to 1 of 1




Cases Returned

 [Bumble, Bea \(9222376\)](#) [Actions](#)
CPS Family - Ongoing Status: Open 07/19/2010 Worker, Richard J. eWiSACWIS Program Team Dane - East 456 Hive Ave , Beetown, WI 53802

3. On the Actions page, select Create Case Note and click Continue to open the Case Notes page.



Actions - Internet Explorer

eWiSACWIS .Print  Spell Check  Help 

Select Action

☐ Archival- Request Retrieval
☐ Case Note Criteria Search
☒ Create Case Note
☐ Create Meeting
☐ Print Case Record
☐ View Ticklers

125%

Creating a Case Note

A Case Note can be entered in two ways: from the Case Notes “base” page (shown below), or in the Structured Case Note page (see the Creating a Structured Case Note section of this guide for more information). This section will describe the base Case Notes page.

Several fields will prefill automatically such as the Case name, Worker Creating Note, Worker Making Contact.

Case Notes - Internet Explorer

eWiSACWIS UAT

Case: Bumble, Bea (9222376) Worker Creating Note: Bee, Worker Worker Making Contact: Bee, Worker [Search](#)

Case Note ID: Date Entered: 11/12/2015 12:56 PM ☐ Note Finalized ☐ Contact By Designee

Note Information

Date: 11/02/2015 Category: Ongoing Services ☐ View Inactive Participants

Begin Time: 02:00 AM ☒ PM Type: Face-to-Face Participants:

End Time: 00:00 AM ☐ PM Type Detail: Face-to-Face Location: Out of Home Care

Duration: 0000.0 Face-to-Face Result: Occurred

☐ Billable

Hold down the 'Ctrl' key for multi-selection

Narrative

Case Note 1/1 [Details](#) [Create Structured Case Note](#)

Document case note here...

[More...](#) [Less...](#) [Default](#)

[Insert Correction Note](#) [Clear Fields](#) [Create](#) [Save](#) [Close](#)

1. Enter the Date, Time, Category and Type and associated information.

Worker Making Contact: There is an option to [Search](#) out the Worker Making Contact, if different than the Worker Creating the Note. Click the Search hyperlink to search and update the Worker Making Contact when applicable.

Contact By Designee: Per policy, agencies may use other professional staff as designees to complete face-to-face contacts. Staff includes those trained to assess safety, facilitate permanence, ensure a child’s well-being, and evaluate the progress of a child and family’s case. To indicate a Case Note completed by a designee, select the Contact by Designee checkbox.

2. Select Participants (if not already selected) from the list. Hold down the ‘Ctrl’ key to Multi-Select.

3. Click Save to save information entered on the page (the Note is not yet finalized). This allows for editing up to 30 days after the case note was created, or until the Note Finalized checkbox is checked.
4. To finalize the Note, select the Note Finalized checkbox, and Click Save. When the Note Finalized checkbox is selected or 30 days have past, the note will be frozen and no longer editable. However, a Correction Note can be inserted if necessary (please see the associated Creating Correction Notes User Guide).

Note: Click Create to create a new Case Note for the same case.

Creating a Structured Case Note

Note: Case assignment is not required to create a Structured Case Note; however access to associated pieces of work in the note may be limited.

Note: Once a note is created in the Structured Case Note format, it cannot be changed to the base Case Note format. Additionally, most changes will need to be done via the Structured Case Note page.

Introduction

A Structured Case Note (SCN) allows for a note to be entered in an organized structure and associates the note to Subject(s) of Contact (child/youth discussed) and related Safety, Case/Permanency Planning, and or Well-being information.

Benefits of entering a note in the Structured Case Note format:

- Presents Safety and Case/Permanency Planning information as of the Case Note date (point-in-time) for the subjects of contact to assist a worker in writing the note narrative.
- Presents Well-being information, and prefills Health Concerns entered via the SCN and medications lists for selected contacts to the base Case Note narrative.
- Allows a Case Notes Search by the subject of the contact; related Safety, Case/Permanency, or Well-Being; and by specific areas under each category. A search can be done directly from the Case/Permanency pages or from Case Note Criteria Search page.
- Presents [Create](#), [View](#), [Edit](#) hyperlinks to assist a worker in viewing existing or pending case work and, if desired, an easy way to create new pieces of work.

Note: Only the narrative text, and any identified Health Concerns and Medication Lists for the subjects of contacts will prefill to the base case note page.

Entering a Structured Case Note

A Structured Case Note is launched from the base case note page (see below). All required fields in the Note Information group box are required prior to launching a Structured Case Note. Narrative text can be entered, but is not required.

1. The following is considered the “base” Case Note page. Click [Create Structured Case Note](#) hyperlink to launch the Subject(s) of Contact and to create a Structured Case Note.

The screenshot displays the 'Case Notes - Internet Explorer' window for the 'eWiSACWIS UAT' system. The interface is divided into two main sections: 'Note Information' and 'Narrative'.

Note Information Section:

- Case: Bumble, Bea (9222376)
- Worker Creating Note: Bee, Worker
- Worker Making Contact: Bee, Worker [Search](#)
- Case Note ID:
- Date Entered: 11/12/2015 12:56 PM
- ☐ Note Finalized
- ☐ Contact By Designee

Note Information Group Box:

- Date: 11/02/2015
- Begin Time: 02:00 (AM/PM radio buttons)
- End Time: 00:00 (AM/PM radio buttons)
- Duration: 0000.0
- ☐ Billable
- Category: Ongoing Services
- Type: Face-to-Face
- Type Detail:
- Face-to-Face Location: Out of Home Care
- Face-to-Face Result: Occurred
- ☐ View Inactive Participants
- Participants: Bramble, Father (Fmr Sig Other), Bramble-Bumble, Queen (Bio Child), Bumble, Bea (Reference Person), Grass, Harper (Niece)
- Hold down the 'Ctrl' key for multi-selection

Narrative Section:

- Case Note 1/1 Details
- [Create Structured Case Note](#) (circled in red)
- More... Less... Default

Buttons:

- Insert Correction Note
- Clear Fields
- Create
- Save
- Close

The bottom right corner shows a zoom level of 125%.

2. The Subject(s) of Contact page lists participants on the case as well as relationship, Date of Birth, and the Age at Contact (age as of the note date). Select the checkboxes for the Subject(s) of Contact (i.e. who you talked about) being addressed in the note. Click Continue to open the Structured Case Note page.

Subject(s) of Contact -- Webpage Dialog

eWiSACWIS UAT Print Spell Check Help

Subject(s) of Contact

Information in this Structured Case Note pertains to (at least one Subject of Contact must be selected):

	Name	Relationship	DOB	Age at Contact
<input type="checkbox"/>	Bramble, Father (9226598)	Former Significant Other	03/02/1974	41 yrs.
<input type="checkbox"/>	Bramble-Bumble, Queen (9226605)	Biological Child	08/01/1993	22 yrs.
<input type="checkbox"/>	Bumble, Bea (9226597)	Reference Person	09/14/1975	40 yrs.
<input checked="" type="checkbox"/>	Grass, Harper (9226601)	Niece	12/16/2005	9 yrs., 10 mos.
<input type="checkbox"/>	Beetle, Asia N. (9226602) (Inactive)	Aunt	09/17/1955	60 yrs.
<input checked="" type="checkbox"/>	Bumble-Bramble, Daughter (9226599) (Inactive)	Biological Child	11/30/1998	16 yrs., 11 mos.

Continue Close

Note: The Age at Contact is the age as of the case note date. For anyone under 21 years old, years and months will be listed, and anyone under 1 year, months only.

Note: If applicable, Inactive participants are listed separately after Active Case participants.

3. The Structured Case Note page contains a Basic Information section, Narrative box, Summary of Items Considered, and Safety, Case/Permanency, and Well-being expandos. The following lettered sections give an overview of each of these areas.

Structured Case Note -- Webpage Dialog

eWiSACWIS UAT

Print Spell Check Help

Basic Information

Date: 11/02/2015 02:00 ☐ AM ☒ PM Case: Bumble, Bea (9222376) Category: Ongoing Services Type: Face-to-Face

Case Note Participants: Bramble-Bumble, Queen, Bumble, Bea

[Select Subject\(s\) of Contact:](#) Bumble-Bramble, Daughter (16 yrs., 11 mos.), Grass, Harper (9 yrs., 10 mos.)

Narrative

Structured Note:

[Details](#)

Summary of Items Considered

☐ Safety [Details](#) ☐ Case/Permanency Planning [Details](#) ☐ Well-being [Details](#)

▶ Safety

▶ Case/Permanency Planning

▶ Well-being

[Save](#) [Close](#)

A. Basic Information

- Date and Time: Prefills from the base Case Note page.


Note: Once created and saved as a Structured Case Note, changes to the date and time of the note must be done on the Structured Case Note page. Changes to Category, Type, and Participants can be made on the base Case Note page.

- Case Name: Prefills from the base Case Note page.
- Category & Type: Prefills from the base Case Note page.
- Case Note Participants: Prefills with the Participants selected from the base Case Note page.
- [Select Subject\(s\) of Contact](#) displays the subjects selected on the Subject(s) of Contact page. Subjects can be changed by clicking the hyperlink to reopen the selection page.

B. Narrative Box:

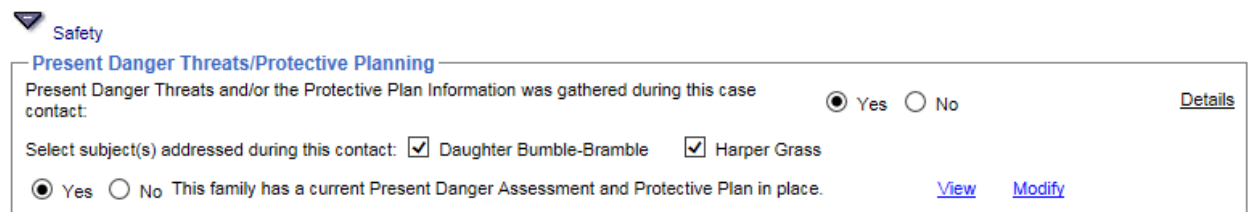
- By default, prefills “Structured Case Note:” and any text if entered in the Narrative on the base note page. Enter narrative here.

C. Summary of Items Considered

- One or multiple checkboxes may be selected to indicate areas addressed: Safety, Case/Permanency Planning, and Well-being. If desired more information regarding these areas can be entered under the following expandos .

D. Safety, Case/Permanency Planning, and Well-being Expandos

- Click the expando button to expand the section. Once opened, each area will list a series of questions with a ‘Yes’ or ‘No’ radio button. Each subjects name will also be listed. The checkbox next to the subject name(s) to indicate if this area was addressed for this particular child/youth during this contact.



The screenshot shows the 'Safety' expando section. It has a title bar 'Safety' with a dropdown arrow. Below it is a section titled 'Present Danger Threats/Protective Planning'. The main content area contains the text: 'Present Danger Threats and/or the Protective Plan Information was gathered during this case contact:'. To the right of this text are two radio buttons, 'Yes' (selected) and 'No'. Further right is a 'Details' link. Below this is a line: 'Select subject(s) addressed during this contact:'. To the right of this line are two checkboxes, both of which are checked. The first checkbox is next to 'Daughter Bumble-Bramble' and the second is next to 'Harper Grass'. At the bottom of the section are two radio buttons, 'Yes' (selected) and 'No', followed by the text 'This family has a current Present Danger Assessment and Protective Plan in place.' To the right of this text are two links, 'View' and 'Modify'.

Note: Selecting the ‘Yes’ radio button and a checkbox for a Subject(s) of Contact, allows for the note to be searchable by that subject and area addressed through Case Note Search.

Hyperlinks and information displayed throughout the sections, depend on several factors such as:

- Date of the Structured Case Note
- Subject(s) of Contacts selected
- Existing eWiSACWIS case work (some work needs to be approved at least one day prior to the SCN Date in order to display)
- The ability to view and create work from the SCN based on assignment and worker security
- Child’s placement (in or out-of-home) as of the Structured Case Note date

Note: Hyperlinks may be available to [Create](#) or [Modify](#) pieces of work, but will not update the note if they are documented and approved after the case note date.

4.



Safety

Safety includes Present Danger Threats/Protective Planning, Impending Danger Threats/Safety Planning, and Placement Danger Threats/Confirming Safe Environments sections.

Based on the subjects selected and Structured Case Note date, available Safety information prefills to the Structured Case Note. For instance, if an approved Protective Plan is in place for the case a [View](#) link may appear, or if an approved Safety Assessment, Analysis, and Plan is in place a summary will prefill with the related safety outcome.



Safety

Present Danger Threats/Protective Planning

Present Danger Threats and/or the Protective Plan Information was gathered during this case contact: ☒ Yes ☐ No [Details](#)

Select subject(s) addressed during this contact: ☒ Daughter Bumble-Bramble ☒ Harper Grass

☒ Yes ☐ No This family has a current Present Danger Assessment and Protective Plan in place. [View](#) [Modify](#)

Impending Danger Threats/Safety Planning

Impending Danger Threats, parental protective capacities, and/or Safety Assessment, Analysis, and Plan information was gathered during this case contact: ☒ Yes ☐ No [Details](#)

Select subject(s) addressed during this contact: ☒ Daughter Bumble-Bramble ☒ Harper Grass

This family(Harper Grass) has an approved Safety Assessment, Analysis, and Plan dated 05/08/2008 where the child(ren) is/are **unsafe** with the following safety threats. [View](#) [Create](#)

No adult in the home will perform parental duties and responsibilities.

One or both parents/caregivers lack parenting knowledge, skills, or motivation necessary to assure the child's basic needs are met.

Placement Danger Threats/Confirming Safe Environments

Information gathered during this case contact indicates the need to update Confirming Safe Environments (CSE/RCSE) documentation: ☒ Yes ☐ No [Details](#)

Select subject(s) addressed during this contact: ☒ Daughter Bumble-Bramble ☒ Harper Grass

No child(ren)/youth are in an Out-of-Home placement at the time of the case note.

5.



Case/Permanency Planning

Case/Permanency Planning includes Permanency Goals, ASFA Exceptions, Relative/Non-Relative Search, Goals and Services, and Review/Hearing sections.



Case/Permanency Planning

Permanency Goals

Permanency Goal(s) information was gathered during this case contact: ☒ Yes ☐ No

Select subject(s) addressed during this contact: ☒ Daughter Bumble-Bramble ☐ ☐ ☐

☒ Harper Grass [Create](#)

Harper Grass: No approved Permanency Plans are documented.

ASFA Exceptions

ASFA Exceptions information was gathered during this case contact: ☐ Yes ☒ No

Select subject(s) addressed during this contact: ☐ Daughter Bumble-Bramble ☐ ☐ ☐

☐ Harper Grass [Create](#)

Relative/Non-Relative Search

Relative/Non-Relative Search information was gathered during this case contact: ☒ Yes ☐ No

Select subject(s) addressed during this contact: ☒ Daughter Bumble-Bramble ☐ ☐ ☐

☐ Harper Grass [Modify](#)

6.



Well-being

Well-being includes Health Concerns, Medications, Education, Family Interaction, and Independent Living. Subject names appear as hyperlinks that open their Person Management record.

Select the checkbox next to the name to indicate if an area was addressed with the subject of contact.



Well-being

Health Concerns

Only Health Concerns created via the person's name hyperlink (below) to their Person Management page will prefill to this note.

Select subject(s) addressed during this contact: ☒ Daughter Bumble-Bramble ☒ Harper Grass

[Bumble-Bramble, Daughter](#)

A Well Child Exam/Visit on 10/30/2015 with New Medical Provider was documented.
The following health concern was noted: Experiencing lower back pain. Comes and goes.

[Grass, Harper](#)

A Sick Child Exam/Visit on 11/12/2015 with New Medical Provider was documented.
The following health concern was noted: Fever with Flu-like symptoms

Medication(s)

The medication list below the name includes the medication names, dosage/frequency, and start date. End dates only appear if the medication was ended 30 days prior to or on the case note date. Select the name hyperlink to access their Person Management page to update/add medication information.

Select subject(s) addressed during this contact: ☒ Daughter Bumble-Bramble ☐ Harper Grass

[Bumble-Bramble, Daughter](#)

Ibuprophen	2 tabs, as needed	10/30/2015 - present
Multi-Vitamin	1 per day, morning	06/03/2014 - present
Prozac	100 ml, daily, in morning	09/04/2012 - present

[Grass, Harper](#)

Acetaminophen	05 ml, orally as needed	10/26/2015 - 10/29/2015
---------------	-------------------------	-------------------------

Note: Only Health Concerns entered via the note for selected subjects of contacts appear in the case note, and prefill to the base Case Note page.

Note: If listed, only current medications and those ended 30 days prior to the case note date will appear, otherwise “There are no current medications documented” statement will appear. Only medications for those selected as subjects of contacts prefill to the base Case Note page.

- Once all information is completed, click Save on the Structured Case Note page to return to the base Case Note page. Narrative, any health concerns documented via the note, and medications selected for Subject(s) of Contact are viewable in the Case Note Narrative section. Additionally, a summary statement “Information in this Structured Case Note pertains to: [displays names of selected Subject(s) of Contact] and addresses [areas addressed in the note].

Case: Bumble, Bea (9222376) Worker Creating Note: Bee, Worker Worker Making Contact: Bee, Worker [Search](#)

Case Note ID: 9225119 Date Entered: 11/12/2015 12:59 PM ☐ Note Finalized ☐ Contact By Designee

Note Information

Date: [Details](#) Category: ☐ View Inactive Participants

Begin Time: ☐ AM ☒ PM Type: Participants:

End Time: ☐ AM ☐ PM Type Detail:

Duration: Face-to-Face Location: Hold down the 'Ctrl' key for multi-selection

☐ Billable Face-to-Face Result:

Narrative

Case Note 1/1 [Details](#) [Modify Structured Case Note](#)

Structured Note: This is the text a worker might enter concerning Daughter Bumble-Bramble and Harper Grass. Details may include Safety, Case/Permanency Planning, and Well-being. Hover the cursor over the 'Details' flares throughout the page for more information.

Health Concerns:

Bumble-Bramble, Daughter

A Well Child Exam/Visit on 10/30/15 With New Medical Provider was documented.
The following health concern was noted: Experiencing lower back pain. Comes and goes.

Grass, Harper

A Sick Child Exam/Visit on 11/12/15 With New Medical Provider was documented.
The following health concern was noted: Fever with Flu-like symptoms

Medication(s):

Bumble-Bramble, Daughter

Ibuprophen, 2 tabs, as needed, 10/30/15 - present
Multi-Vitamin, 1 per day, morning, 06/03/14 - present
Prozac, 100 ml, daily, in morning, 09/04/12 - present

[Information in this Structured Case Note pertains to: (Daughter Bumble-Bramble, Harper Grass) and addresses: [Safety, Case/Permanency Planning and Well-being]

[More...](#) [Less...](#) [Default](#)

Options: [Go](#)

[Insert Correction Note](#)

[Clear Fields](#)

[Create](#)

[Save](#)

[Close](#)

- Prior to note finalization, the note can be modified by clicking the [Modify Structured Case Note](#) hyperlink from the base note page.

9. Once a note has been marked on the base Case Notes page as Note Finalized, a [View Structured Case Note](#) hyperlink is available to view the note in the structured format, but hyperlinks to associated pieces of work will no longer be available.

Searching Structured Case Notes from a Case or Permanency Plan

Structured Notes can be searched directly from a Case or Permanency Plan. Clicking the [Safety](#), [Case/Permanency Planning](#), or [Well-being](#) will return Structured Case Notes where that specific area was addressed for the subject(s).

The screenshot displays the eWiSACWIS UAT interface. At the top, there is a header bar with the logo 'eWiSACWIS UAT' and navigation links: Resource, TM, Print, Spell Check, and Help. Below the header, a 'Basic' group box contains the following information:

Child Name: Grass, Harper (9226601)	Birth Date: 12/16/2005	Plan Date: <input type="text" value="11/12/2015"/> Details
Case Name: Bumble, Bea (9222376)	Plan Is: Original	Plan Due Date: 08/30/2015
Person Type: CW	Plan Type: CW, OHC	Next Permanency Review/Hearing Due: 01/01/2016
Case Notes: Safety Case/Permanency Planning Well-being Case Note Search		

Below the 'Basic' group box, there is a horizontal navigation bar with the following tabs: **Basic**, Considerations for Review/Hearing, Removal, Placement, Permanency, Well-Being, and Planning & Services.

1. Select a hyperlink from the Basic group box to search previously entered Structured Case Notes where both the child/ren are identified as a subject(s) of contact, and where the related area was addressed.

Note: Opening the [Case Note Search](#) hyperlink on pre-select all Categories and Types.

2. The Case Note Search Criteria page will pre-select information based on the hyperlink selected. The date range defaults 6 months from today's date. The range can be adjusted to expand or narrow a search. Click Search, or modify search criteria as desired.

The screenshot shows a web browser window titled "Case Note Search Criteria -- Webpage Dialog". The page has a purple header with the "eWiSACWIS UAT" logo and navigation links for Print, Spell Check, and Help. The main content area is titled "Note Criteria" and contains the following elements:

- Case Information:** Case: Bumble, Bea; Number: 9222376; Start Date: 05/16/2015; End Date: 11/12/2015.
- Instructions:** "Hold down the 'Ctrl' key for multi-selection".
- Access Type:** A dropdown menu with options: Access - Other, Access - Telephone Call, Adoption - Collateral, and Adoption - Correspondence.
- Worker Selection:** Two side-by-side lists for "Worker Creating Note" and "Worker Making Contact". Both lists contain: Bee, Worker; Supervisor, County; Worker, Richard; and Wutt, Jason.
- Text Search:** A text input field with the label "Text Search:".
- Structured Note Criteria:** A section with a "Types" dropdown menu. The dropdown is open, showing options: Safety, Safety - Present Danger Threats/Protective Planning, Safety - Impending Danger Threats/Safety Planning, Safety - Placement Danger Threats/Confirming Safe Environments, Case/Permanency Planning, Case/Permanency Planning - Permanency Goals, Case/Permanency Planning - ASFA Exceptions, and Case/Permanency Planning - Relative/Non-Relative Search.
- Subject(s) of Contact:** A list box containing: Bramble, Father; Bramble-Bumble, Queen; Bumble, Bea; Grass, Harper (highlighted); Beetle, Asia N. (Inactive); and Bumble-Bramble, Daughter (Inactive).
- Buttons:** "Search" and "Close" buttons at the bottom right.

Note: Opening a hyperlink from a Case Plan, will pre-select all children on the plan. For a Permanency Plan, only the named child will be pre-selected.

3. The Case Note Search Criteria will display all results that fit the criteria.

Case Note Search Criteria -- Webpage Dialog

eWiSACWIS^{UAT} Print Spell Check Help

Note Criteria

Case: Bumble, Bea Number: 9222376 Start Date: 05/16/2015 End Date: 11/12/2015 Worker Name: All

Records 1 to 1

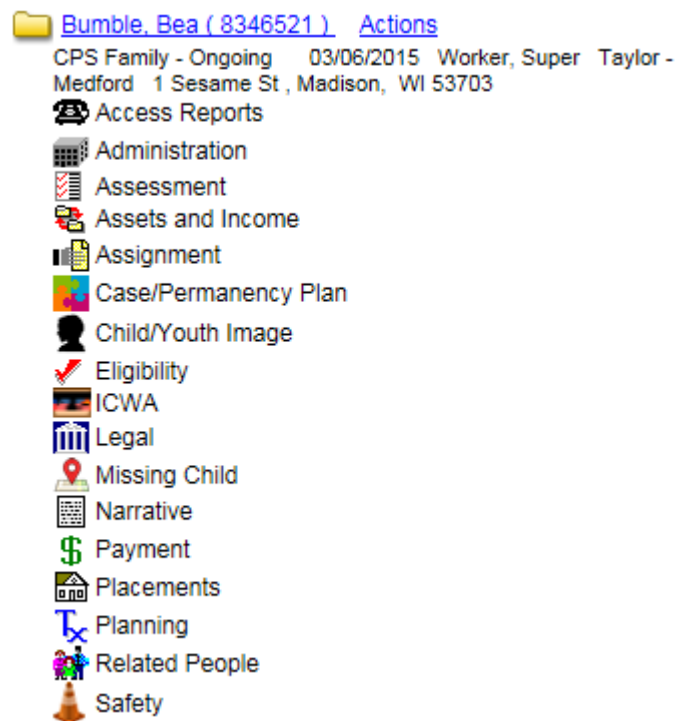
Notes

CNID	Date/Time Occurred	Date Entered	Category	Type	Worker Name	Billable		
9225119	11/02/2015 02:00 PM	11/12/2015	Ongoing Services	Face-to-Face	Bee, Worker	No	Print	View

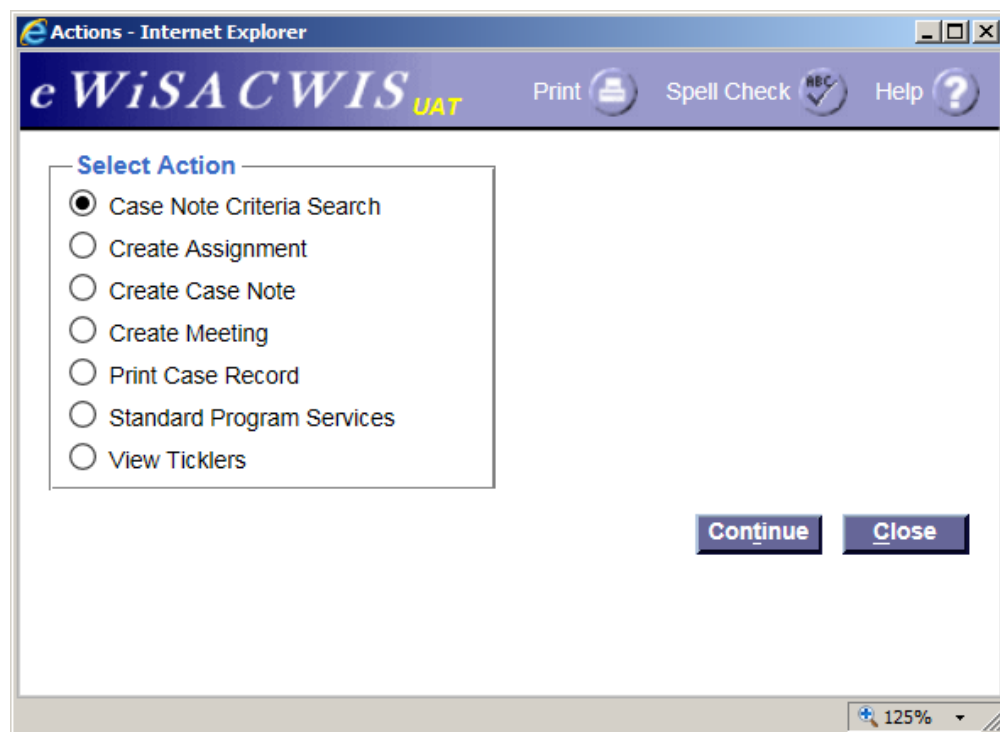
Options:

Viewing/ Printing Case Notes

1. To view or print multiple notes for a case at one time, select the [Actions](#) hyperlink to the right of the Case Name to open the Actions pop-up page.



2. On the Actions page, select Case Note Criteria Search and click Continue.



3. Enter the criteria for the notes to be searched. Start Date and End Dates default 30 days prior to today's date, and can be changed to expand or narrow the search. At least one Category is required. Once all desired criteria are entered, click the Search button.

The screenshot shows the 'Case Note Search Criteria' form in an Internet Explorer browser window. The form has a header bar with the 'eWiSACWIS UAT' logo and navigation links for Print, Spell Check, and Help. Below the header, the 'Note Criteria' section contains fields for Case (Basket, Mom), Number (9224000), Start Date (10/11/2015), and End Date (11/10/2015). A note below this section says 'Hold down the 'Ctrl' key for multi-selection'. The 'Category and Type Criteria' section is divided into two columns. The left column has 'Categories' and 'Types' lists. The 'Categories' list includes Access, Adoption, Appeal, BMCW RN-Intl Assmnt, BMCW RN-Ongoing, BMCW Safety Services, and CW Assessmnt Contact. The 'Types' list includes - null, Access - Collateral, Access - Correspondence, Access - Face-to-Face, Access - Other, Access - Telephone Call, Adoption - Collateral, and Adoption - Correspondence. The right column has 'Selected Categories' and 'Case Participants' lists. The 'Selected Categories' list includes Access, Adoption, Appeal, BMCW RN-Intl Assmnt, BMCW RN-Ongoing, BMCW Safety Services, and CW Assessmnt Contact. The 'Case Participants' list includes Basket, Kid, Basket, Baby, Basket, Dad, and Basket, Mom. Between the two columns are buttons: Add >, Add All >>, < Remove, and << Remove All. Below the 'Categories' and 'Types' lists are two text boxes: 'Worker Creating Note:' and 'Worker Making Contact:', both containing the text 'Bee, Worker'. At the bottom right of the form are 'Search' and 'Close' buttons. A vertical scrollbar is on the right side of the form.

Note: A key word search can be used by typing a specific key word in the Text Search field, however common words (e.g. a, and, then, etc.) will return no records.

4. The Case Note Search Results page return all notes specified in the Case Note Search Criteria.

Case Note Search Results - Internet Explorer

eWiSACWIS UAT

Print Spell Check Help

Note Criteria

Case: Basket, Mom Number: 9224000 Start Date: 10/05/2014 End Date: 11/10/2015 Worker Name: All

Records 1 to 4

Notes

CNID	Date/Time Occurred	Date Entered	Category	Type	Worker Name	Billable		
9225099	02/26/2015 08:00 AM	11/10/2015	Child Welfare	Telephone Call	Bee, Worker	No	Print	View
9225098	05/05/2015 11:00 AM	11/10/2015	Ongoing Services	Correspondence	Bee, Worker	No	Print	View
9225077	11/01/2015 10:00 AM	11/09/2015	Child Welfare	Face-to-Face	Bee, Worker	No	Print	View
9225097	11/02/2015 02:00 PM	11/10/2015	Ongoing Services	Face-to-Face	Bee, Worker	No	Print	View

Options: [Print All Notes](#) [Go](#) [New Search](#) [Close](#)

100%

- Notes can be sorted by clicking on that blue column header; i.e. [Date/Time Occurred](#), [Date Entered](#), [Category](#), [Type](#), etc.
- To show notes only for a particular worker, select that worker from the Worker Name drop down.
- To [Print](#) or [View](#) a specific case note, select the appropriate hyperlink to the right of that note.
- To preview all the notes with the option to print, select Print All Notes from the Options drop down on the bottom of the page and Click Go.

- Notes will print in the order sorted on the page in Microsoft Word document.

9234854.0 [Compatibility Mode] - Microsoft Word

File eWISACWIS

Print Cut Copy Paste Zoom Spell Check Copy From Bookmarks Close and Return to eWISACWIS

Case Name: **Basket, Mom** Case ID: **9224000**

Date: **02/26/2015** Note **1** of **4**

Begin Time: **08:00 AM** End Time: Participants: **Basket, Baby; Basket, Dad; Basket, Kid; Basket, Mom**

Duration: **0** Billable: ☐ Category: **Child Welfare** Type: **Telephone Call**

Face-to-Face Location: Face-to-Face Result: Type Detail:

Worker Making Contact: **Bee, Worker** Contact by Designee: ☐

Note

Date: **05/05/2015** Note **2** of **4**

Begin Time: **11:00 AM** End Time: Participants: **Basket, Dad; Basket, Kid; Basket, Mom**

Duration: **0** Billable: ☐ Category: **Ongoing Services** Type: **Correspondence**

Face-to-Face Location: Face-to-Face Result: Type Detail:

Worker Making Contact: **Bee, Worker** Contact by Designee: ☐

This is a note...

Page: 1 of 2 Words: 280 106%

Quick View of Case Notes from the Desktop

From the desktop (or from case search), expand the case, and then click to expand the narrative icon. Hover the cursor over the word Details to see the first 120 characters of that case note. To view the entire note, click the note hyperlink.

Bumble, Bea (9222376) [Actions](#)

CPS Family - Ongoing 07/19/2010 Worker, Richard J. Dane - East 456 Hive Ave , Beetown, WI 53802

- Access Reports
- Administration
- Adoption
- Assessment
- Assets and Income
- Assignment
- Case/Permanency Plan
- Education
- Eligibility
- Extraordinary Payment Requests
- ICWA
- Legal
- Narrative
 - [Ongoing Services - Face-to-Face](#) (Details) 11/02/2015 Bee, Worker (Bramble-Bumble, Queen)
 - [Child Welfare - Correspondence](#) (Details) 10/01/2015 Bee, Worker (Bramble-Bumble, Queen)
 - [Ongoing Services - Face-to-Face](#) (Details) 09/01/2015 Bee, Worker (Bramble-Bumble, Queen)

Structured Note: This is the text a worker might enter concerning Daughter Bumble-Bramble and Harper Grass. Details may